

Infinite Campus Cloud Migration District Readiness Guide

Version 1.9

May 10, 2017

Revision History

This section records the change history of this document.

Date	Comment/Reason for Change	Version
10/7/2016	Initial draft.	1.0
11/22/2016	Added “change ODBC usernames if provided in your support ticket” to “Configure 3 rd party ODBC Applications” in Post-Migration Tasks section.	1.1
12/1/2016	Replaced “LINK TO BE PROVIDED” for Data Extract Utility Client with Campus Community documentation URL in Four or more weeks and Post-Migration Tasks sections.	1.2
12/8/2016	Added temporary download link and note for Data Extract Utility Client to Four or more weeks and Post-Migration Tasks sections.	1.3
12/14/2016	Added note to “Campus Data Import/Extract Preparation” in Four or more weeks section regarding SFTP not being an option (only FTPS) for FRAM Eligibility import wizard.	1.4
12/22/2016	Replaced temporary Data Extract Utility Client documentation link with permanent link in Four or more weeks and Post-Migration Tasks sections.	1.5
2/3/2017	<ul style="list-style-type: none"> – Updated item 4 in “Important items to note” regarding Mobile Portal app. – Added “The current password for each ODBC login” to “3rd Party ODBC Application Preparation” in Eight or more weeks section. – Clarified that the Data Extract Utility Client can be implemented immediately rather than with a future Campus release in “Campus Data Import/Extract Preparation” in the Four or more weeks section. – Clarified that surrogate (NAT) IP addresses for Windows file servers using SMB will be provided by KETS to Infinite Campus and then to districts via their Cloud support case in “Campus Data Import/Extract Preparation” in the Four or more weeks section. – Added “Verify that a NON-LDAP account with sufficient access to reconfigure the LDAP settings is available for use” to “LDAP Integration Testing Preparation” in Two weeks before migration section. – Added information regarding configuration of the portal URL in the “Validate configuration of Campus Messenger Email settings, if applicable” section in Post-Migration Tasks. 	1.6
2/28/2017	<ul style="list-style-type: none"> – Clarified that districts should plan for Campus to be unavailable overnight once the migration process has been initiated. 	1.7

Date	Comment/Reason for Change	Version
4/11/2017	– Updated item #1 on page 4 to remove reference that districts will need to request a URL redirect from Campus.	1.8
5/10/2017	– Updated LDAP information on pages 9 and 11 with a note advising districts to convert from “old” to “new” LDAP Authentication several days before or several days after the migration. Also provided a link to updated “new” LDAP Authentication documentation.	1.9

Kentucky COT/In-District to Campus Cloud - Customer Information

This document contains important information and instructions relating to a district migrating their Infinite Campus (IC) application from the COT, or in-district server(s), to the Campus Cloud (CC) platform. At the end of this document, we have provided 3 checklists to be performed at different times before your migration. These checklists are for 8 weeks, 4 weeks and 2 weeks before migration, and we have also provided a post-migration checklist. Please be sure to read this entire document before working on the checklists.

More information about the KSIS/IC Cloud Migration, including a Frequently Asked Questions document and **updated versions of this document** as they are released, can be found on KDE's KSIS Cloud Migration web page:

<http://education.ky.gov/districts/tech/sis/Pages/KSIS-Cloud.aspx>

Most communications with districts regarding details of their district's Cloud migration will be carried out through a Campus Community support case (subject: Move to Campus Cloud). Each district has multiple KSIS Support Contacts who have access to Campus Community and those persons should review, respond to, and monitor the support case.

General information will also be shared through the KSIS Point of Contact distribution list and the KDE website. Lisa Rhoton, Infinite Campus's Client Executive for Kentucky school districts, will be the primary point of contact for migration work. Please contact Lisa with any questions about this document, the migration process, or the Campus Private Cloud environment. Lisa can be reached at lisa.rhoton@infinitecampus.com and 502-758-3680.

Important items to note:

The following items are important considerations to keep in mind prior to your migration:

1. **The URL(s) of your Infinite Campus application will be changing.** This includes your production, sandbox, and Parent Portal environments. These URL(s) will generally be communicated to you prior to the migration date. Districts are responsible for communicating this change to their end users. Production URL re-directs will be put in place for a minimum of 90 days post-migration. Districts are still responsible for making sure their end users have the new production URL.
2. **The URL(s) for SSRS will also change.** Districts will need to make sure that any custom reports, outline links, etc. are modified as part of the migration process. (Where applicable.)
3. **For users of ODBC - your ODBC connection string will change, AND you will be required to use SSL for connectivity.** You will be provided with the new information as part of your support case.
4. **For users of the Infinite Campus Mobile Portal app –** Infinite Campus recommends installing all App updates as they become available. If a user experiences an issue with the mobile app

please refer to Campus Community at: <https://www.infinitecampus.com/audience/parents-students>.

5. **District users will not have Remote Desktop access to the Campus Cloud servers.**
6. **All district users will still have access to their data via ODBC.** All ODBC user accounts that exist on the COT/in-district servers will be audited for necessary paperwork, and then moved to the Campus Cloud server(s) as appropriate. If the proper paperwork is not on file, the district will be notified to submit the necessary documents prior to the move. Security practices require this step for *existing* user accounts. In addition, some users may have their usernames renamed to conform to our standards. You will be notified via your support case should this be necessary. If a *new* user account needs to be created, please create a *new* support case with your request.

NOTE: If your district currently has an in-district server, and the ODBC user account has *SysAdmin* access, it will automatically be downgraded to *DBO* as SysAdmin access would allow access to ALL districts' data.

7. **District users will still be allowed to utilize SQL Server Reporting Services (SSRS). If the district uses SSRS please let us know via your support case so that necessary user accounts can be set up on the Cloud SSRS server.**
8. **Districts that use SIF agents to communicate between Infinite Campus and a third-party may need to reconfigure their agents.** If your district uses SIF agents we will notify you via your support case of any potential changes to look for.
9. **Districts using Campus Food Service please be sure to read the sections below about Point of Sale Terminal reconfigurations.**

Scheduling of the migration:

The usual start time for a migration is 9:00AM CT, Monday - Friday. During the migration your entire site (including the parent portal and mobile portal) will be down overnight once the migration process has been initiated. Please make arrangements for this downtime once the migration has been scheduled. Your district's official migration time will be detailed in your "Move to Campus Cloud" support case.

The migration process:

The migration process will involve the moving over and the configuring/re-configuring of your production, sandbox, and other environments or applications supported by the Infinite Campus Hosting Model to the Campus Cloud environment. An example of data that is automatically moved over includes the document store (pictures, PDF/FDF documents, etc.), the production/sandbox webapps and production database, and SQL Server Reporting Services. During the migration process the sandbox database will be refreshed from the production database data. If you would like us to move the sandbox database as part of the migration, you will need to notify us *prior* to the migration via your support case with your request.

IMPORTANT NOTE FOR THOSE WITH IN-DISTRICT SERVERS: If there is any other data on the server(s) that is not part of the standard Infinite Campus Hosting Model, such as:

- Specific file(s) and/or folder(s) (outside of D:\INFINITECAMPUS)
- Non-standard databases (other than the production and sandbox databases)

- SQL Server Agent jobs
- DTS packages
- Third party Data Exports (separate from the KY Data Extract Utility)
- Third party reporting functionality
- Windows Scheduled tasks
- Custom Development items

These items will not be moved over to the Cloud environment. If there is a business need for an item (such as a custom database), or if a Custom Development item was created by Infinite Campus, please let us know via the support case and we will work together to make arrangements to have those items reconfigured/reinstalled as part of the move.

Checklists:

• **Eight or more weeks before migration:**

These tasks are to be completed and verified at least 8 weeks in advance of the district's Private Cloud migration date.

- **Collect and share new site/address information** - Your district's new website URLs and database connection information will be provided in your "Move to Campus Cloud" Campus Community support case. Share this information with those in your district who will need it to do further preparations.
- **Determine migration date/time** - Follow instructions in your district's "Move to Cloud" Campus Community support case to determine the specific migration date and time for your district.
- **Special Circumstance Preparations** - Determine if your district does any of the following, and if so, contact Infinite Campus (via your district's "Move to Cloud" Campus Community support case) to discuss alternatives and adjustments:
 - Logs into Campus server using Windows Remote Desktop
 - Copies files directly to the Campus servers
 - Configures linked servers within the Campus SQL Server
 - Installs reports into the Campus-provided SQL Server Reporting Service installation
 - Schedules tasks using the Campus SQL Server job scheduler (within SQL Server Management Studio)
 - Uses a Campus ODBC (SQL Server) account that has SysAdmin privileges
 - Uses SIF to communicate between Campus and a third-party system (Campus documentation about SIF is here: <https://content.infinitecampus.com/sis/1434/documentation/sif-data-exchange/>)
 - Uses a Campus custom data import (found under System Administration -> Data Utilities -> Data Import) **other than** the CIITS Gradebook Import
- **3rd-Party ODBC Application Preparation** - Make a list of any 3rd-party applications (Schoology, OneCall, etc.) that connect to Campus using "ODBC Access" and determine:
 - How to configure the tool to make SQL Server encrypted (SSL) connections
 - Who will reconfigure each one to use new database IP address and an encrypted connection
 - How each one will be tested to verify correct functionality once migrated to the Cloud environment
 - The current password for each ODBC login

In most cases, Campus will provide your district (via your district's "Move to Cloud" Campus Community support case) with new ODBC usernames to prevent duplicates across districts.

- **3rd-Party Web Application Preparation** - Make a list of any 3rd-party applications through the web interface (such as Clever Auto Sync) and determine:
 - Who will reconfigure each one to use the new Campus URL
 - How each one will be tested to verify correct functionality once migrated to the Cloud environment
- **Campus Food Service Terminal Preparation** - If your district uses Campus Food Service, determine who will reconfigure each Food Service terminal after the migration is complete (more details are found in the Post-Migration Tasks section)

• **Four or more weeks before migration :**

These tasks are to be completed and verified at least 4 weeks in advance of the district's Private Cloud migration date.

- **3rd-party Export Preparation** - Make a list of the existing data exports/reports using 3rd-party tools (SQL Server Integration Services, Crystal Reports, Access, etc.) and "ODBC Access" and determine:
 - How to configure the tool to make SQL Server encrypted (SSL) connections
 - Who will reconfigure each one to use the new database IP address and an encrypted connection
 - How each will be tested to verify correct functionality once migrated to the Cloud environment

Note: In most cases, Campus will provide your district (via your district's "Move to Cloud" Campus Community support case) with new ODBC usernames to prevent duplicates across districts.

- **Campus Data Import/Extract Preparation** - Data Imports and Extracts using Campus-provided features will require some adjustments. All Cloud districts will be able to use the Premium (aka Custom Development) Data Extract Utility (documentation here: <https://content.infinitecampus.com/sis/1545/documentation/data-extract-utility-custom-development/>), which includes additional extract methods.
 - Make a list of the Campus data imports (FRAM Eligibility) and Extracts (using either the Kentucky Extract Utility or the Premium Data Extract Utility) that your districts uses today, noting the Protocol/Delivery Mode used for each. These imports/extracts will require modifications in order to continue working after Cloud migration
 - For each import/extract that currently uses the SMB protocol/delivery mode, determine what mode will be used after migration, from amongst:
 - Secure FTP (FTPS or SFTP), which will require district setup of a secure FTP server and coordination of a public IP address with the KETS Service Desk; this transition can be implemented as soon as desired or just after migration

Note: For FRAM Eligibility import wizard - SFTP is NOT an option (only FTPS).

- For Extracts only, the Campus Premium Data Extract Utility Client, a new tool that will allow districts to automate extracts to multiple district servers without KETS involvement; documentation for this tool is here: <https://content.infinitecampus.com/sis/1649/documentation/data-extract-utility-custom-development/>. Download link here: https://updates.infinitecampus.net/packages/custom/DataExtractUtil/DataExtractClient/ExportWizard11_02_2016.zip. This transition can be implemented immediately, though a further minor update will be required post-migration (details are found in the Post-Migration Tasks section below)
- SMB (Windows file server), which will require coordination with the migration project (details below)
 - For each import/extract for which the district will continue to use SMB (Windows file server):
 - Determine which district Windows file servers are currently used to receive the extract; within the Data Extract Utility this is labeled as Server, and within the FRAM Eligibility Wizard Scheduled Import this is labeled as Host
 - If more than one Windows file server is used today, try to consolidate usage to a maximum of three Windows file servers
 - Submit the name(s) and local IP address(es) of the Windows file server(s) via your district's "Move to Cloud" Campus Community support case. Surrogate (NAT) IP addresses for these Windows file servers will be provided by KETS to Infinite Campus and then through the support case to the district. This IP address allows for a translation to be done from Infinite Campus to the server on the KETS network. You DO NOT need to reconfigure the IP address on the Windows file server
- **Notification to Campus regarding additional content to migrate** - Notify Campus (via your district's "Move to Cloud" Campus Community support case) if you need to migrate any non-standard content, including:
 - Non-standard SQL Server databases
 - Etc.
- **Communication Planning**
 - Plan for communicating the new Campus URLs (both teacher/staff and the Parent/Student Portal)
 - Determine what communication channels (email, web page, newsletter, etc.) will be used
 - Determine who will send/publish communications by each channel and when
 - Determine who will update existing website links and documents (orientation materials, help documents, standard letters, automated emails, etc.) and when
 - Plan for communicating the Campus downtime
 - Plan what communication channels (email, district web page, Campus home page, etc.) to use
 - Determine who will send communications and when
- **Migration Monitoring Planning**
 - Determine who will be available to monitor the migration and communicate with Infinite Campus on the day of migration
 - Determine who will do basic testing just prior to and just after migration to verify proper functionality

- **Sandbox Refresh Notification** - During a migration, Campus normally refreshes the district Sandbox database to match the Production database. If your district specifically wishes to have the Sandbox database migrated *without* a refresh from Production, please notify Campus (via your district's "Move to Cloud" Campus Community support case).

- **Two weeks before migration:**

These tasks are to be completed and verified about 2 weeks in advance of the district's Private Cloud migration date.

- **Communication Status Check** - Verify that the communication plans determined previously are being carried out as intended.
- **LDAP Integration Testing Preparation** - If the district uses LDAP to enable Active Directory integration for any users:
 - Verify that a NON-LDAP account with sufficient access to reconfigure the LDAP settings is available for use
 - Identify Active Directory credentials that currently work for login to Campus and record for use during post-migration testing.

Note: If the district is still using the "old" LDAP Authentication, do NOT convert to new LDAP Authentication at the same time as the cloud migration; either complete the conversion to new LDAP Authentication several days before cloud migration, or wait until several days after migration. For more information regarding new LDAP Authentication, consult the [KSIS Cloud District Technical Reference](#) on the [KDE KSIS Cloud Migration webpage](#).

- **Readiness Notification** - Contact Campus (via your district's "Move to Cloud" Campus Community support case) to let them know that the district is prepared for migration as scheduled and how to contact the district staff person identified above on the day of migration.
- **Campus Food Service Communications Configuration** – If your district uses Campus Food Service, the communications configuration must be adjusted as follows:
 - Log into the Campus Application as a System Admin user and navigate to System Administration > Data Interchange > Zones
 - Select the "POS" zone by clicking on the item
 - Find the checkbox labeled "Allow HTTP"; if it is NOT checked, check this box
 - Click Save

Note: This setting only affects communications between Campus application servers and does NOT mean that communications between the Campus application servers and the Food Service Terminals is unencrypted.

- **Just before migration** - These tasks are to be completed and verified the day before or day of the district's Private Cloud migration:
 - **Pre-migration Data Check** - If desired, run a Campus report and save the results for post-migration; we recommend a report that is frequently used (daily or weekly) and whose contents are well understood such as the Enrollment Summary report or an attendance report.

- **Post-Migration Tasks:**

These tasks are to be completed and verified as soon as Campus has notified the district that migration is complete.

- **Verify Basic Functionality -**
 - Ability to log in at new URL (both District Edition and Portal)
 - Data up-to-date – run the same report that was generated pre-migration and compare to post-migration results
 - Appropriate message displayed when browsing to pre-migration URL for district (Campus will arrange for an informational web page that is displayed when people browse to the pre-migration URL)
- **Configure Campus Data Imports/Extracts**
 - Any existing Data Imports and Extracts using Campus-provided features and the SMB protocol/delivery mode at the time of migration will need adjustment to continue working. In addition, any extracts switched to the Campus Premium Data Extract Utility Client in advance of migration will require a minor adjustment.
 - For each import/extract that continues to use the SMB protocol, replace the IP address currently recorded (within the Data Extract Utility this is labeled as Server, and within the FRAM Eligibility Wizard Scheduled Import this is labeled as Host) with the surrogate (NAT) IP address provided in your district's "Move to Campus Cloud" Campus Community support case.
 - For each extract that uses the Campus Premium Data Extract Utility Client, update the Login URL field to use the district's new Cloud login URL. Further documentation of the Campus Premium Data Extract Utility Client is here: <https://content.infinitecampus.com/sis/1649/documentation/data-extract-utility-custom-development/>. Download link here: https://updates.infinitecampus.net/packages/custom/DataExtractUtil/DataExtractClient/ExportWizard11_02_2016.zip.
- **Configure 3rd-Party ODBC Applications** - Update the connection string for the Campus SQL server, make sure you change the ODBC usernames if provided in your support ticket, enable SQL Server encryption, and verify functionality as previously planned.
- **Configure 3rd-Party Web Applications** - Update the Campus URL in each application and verify functionality as previously planned
- **Configure 3rd-party Exports** - Update the connection string for the Campus SQL Server, enable SQL Server encryption, and verify functionality as previously planned
- **Configure Food Service Terminals** - If your district uses Campus Food Service, update the configuration of each of the terminals as follows:
 - Log into the terminal, either directly or via Remote Desktop
 - Generate POS Reports to ensure that all transactions processed on the terminal thus far have posted as expected. If there is concern regarding missing transactions within Campus, submit a Support case and then call the Premium Products Support line at 888-461-2004, option 6
 - Log into Infinite Campus using the district's **new** URL
 - Navigate to Point of Sale > Administration > Terminals (tab)
 - Select the terminal name that is associated with the terminal which is being reconfigured (logged into)
 - Complete the Install Terminal steps as described here: <https://content.infinitecampus.com/food-service/1637/documentation/terminal-installation-and-configuration/#TerminalInstallationandConfiguration->

- [InstallTerminal](#) and then reboot the terminal; this is necessary even if the Terminal component was already installed on this terminal
 - Log back into the terminal, log into Infinite Campus using the new URL, and complete a POS Reload as described here:
<https://content.infinitecampus.com/food-service/1637/documentation/terminal-installation-and-configuration/#TerminalInstallationandConfiguration-LoadPOSData>
 - Set the POS Options as described here: <https://content.infinitecampus.com/food-service/1637/documentation/terminal-installation-and-configuration/#TerminalInstallationandConfiguration-SetPOSOPTIONS>
 - Launch the POS application and log in with a Cashier PIN to ensure that the service layout displays as expected and that patrons are loaded
 - *Note:* if the district wishes to rename, add or remove terminals, consult the general Campus documentation regarding terminal configuration (<https://content.infinitecampus.com/food-service/1637/documentation/terminal-installation-and-configuration/>) and/or contact Campus Premium Products Support at 888-461-2004, option 6
- **Configure LDAP if applicable -**
 - If the district uses LDAP to enable Active Directory integration for any users, update the IP addresses for the Active Directory servers. See <https://content.infinitecampus.com/sis/1314/documentation/ldap-authentication/> in Campus Community for information about modifying the LDAP configuration. Only the values in the “Server x Host:” fields will need to be changed; the required new values will be provided via your district’s “Move to Campus Cloud” Campus Community support case. After changing the configuration, be sure to test a login using the Active Directory credentials that were verified to work before migration.

Note: If the district is still using the “old” LDAP Authentication, do NOT convert to new LDAP Authentication at the same time as the cloud migration; either complete the conversion to new LDAP Authentication several days before cloud migration, or wait until several days after migration. For more information regarding new LDAP Authentication, consult the [KSIS Cloud District Technical Reference](#) on the [KDE KSIS Cloud Migration webpage](#).

- **Validate configuration of Campus Messenger Email settings, if applicable -**
 - If your district uses the Campus Messenger email functionality and was previously configured to use the KETS SMTP relay (ketsmail.us), as part of the migration Campus will update the SMTP Host value to the Campus-provided SMTP relay (smtp-relay.infinitecampus.org). If your district was using another SMTP relay, you can switch to the Campus-provided relay or continue to use your existing relay. See <https://content.infinitecampus.com/sis/1609/documentation/email-settings/> in Campus Community for information about modifying the email settings.

Note: The Campus SMTP relay will not send email messages that are larger (including attachments) than 1.3 MB.

- The Portal URL field in System Administration > Messenger > Messenger Preferences > Messenger Settings (tab) should be updated following the generation of new URL for a district (documentation link and screenshot on following page). This is to ensure that Campus Fields in messenger templates will direct a recipient to the correct/updated Portal URL. For instance, the

Campus Field 'missingMessenger.portalURL' is used within Missing Assignment Messenger and will pull from this 'Portal URL' field.

Adding 'portal/' within the Production URL will bring up the district's new Portal URL:

Production URL: <https://kyede5.infinitecampus.org/campus/district name.jsp>

Portal URL: <https://kyede5.infinitecampus.org/campus/portal/district name.jsp>

***Highlighted portions should be replaced with your district's information. The urls are provided in your Cloud migration support case.**

If this field is not updated with the new Portal URL, recipients will be directed to the old Portal address.

<https://content.infinitecampus.com/sis/1701/documentation/messenger-settings/>

Voice Settings Prompt Preferences Email Settings **Messenger Settings**

Save

Portal URL Settings

***Portal URL**

(URL to insert in messages directing parents to login to parent portal)